

ATTACHMENT D

SCOPE OF WORK REQUIREMENTS

The Scope of Work must include:

1. **Existing Conditions:** Identify existing conditions, assumptions, and required tasks.
2. **Site Energy Reduction Goal:** Identify the site energy reduction goal and provide some discussion on reasonableness of goal as well as how the site plans to meet the target.
3. **Industrial site energy acuity and project implementation history:**
 - a. Provide existing corporate sustainability or energy goals
 - b. Show ability to implement sizeable (>1,000 MWh electric or > 10,000 MMBtu fossil fuel), complicated (multi measure) energy and productivity projects
 - c. Highlight independent or peer recognition for energy projects
4. **Current state of energy management:** Describe the long-term need/ desire for an On-site Energy Manager, and provide detail on site plan to integrate the On-site Energy Manager into the operational team and business process, including:
 - a. Background that explains special need/desire for an On-site Energy Manager
 - b. Plan for incorporating the On-site Energy Manager into the broader team
 - c. Description of existing:
 - i. Organizational cultures (e.g. safety culture, quality, energy, etc.) and awareness training programs
 - ii. Energy tracking and monitoring system
 - iii. Cross-functional energy team
5. **Peer to Peer Sharing:** Show a willingness for peer to peer sharing throughout the Pilot
6. **Schedule:** Include a schedule and indicate full time (Large Sites) or part time (Medium Sites) on-site engagement.
7. **Budget:** Include a detailed budget that shows hours and dollars allocated to each task of the scope of work. The budget must be reasonable and must show the portion of the budget being requested by NYSERDA and the portion that is the customer's responsibility. Budget Template (Attachment E) or equivalent must be completed.
8. **Required Tasks** (must be included in the Scope of Work at a minimum; additional tasks related to energy management and productivity improvement may be added):
 - a. Develop and provide an energy management plan within 3 months of contracting the On-site Energy Manager to work towards the site provided energy goal
 - b. Develop and/or maintain energy tracking and monitoring system
 - c. Develop and/or maintain a cross-functional energy team and hold monthly meetings
 - d. Develop a strategy for energy savings Measurement & Verification
 - e. Conduct walkthrough audits and reports that identify savings opportunities for further investigation; provide to NYSERDA and industrial site for review and comment
 - f. Review maintenance operational schedules and procedures to identify operational savings opportunities; schedule at least 1 employee training session to address operational misuses that impact energy
 - g. Develop and propose energy and productivity projects; including developing the business case
 - h. Reporting:
 - i. Quarterly savings reports that document results from both capital upgrades and operational changes
 - ii. Project management check-ins with NYSERDA via conference call at least once per month and twice per year on-site, or at NYSERDA's discretion
 - iii. Final report that documents overall effort and progress against site energy goal
 - i. Tool development:
 - i. Case study, including savings metrics, for online publishing
 - ii. Road map of the On-site Energy Manager on-boarding process, for online publishing. The road map is expected to be a look-back of the participant's experience, with recommendations and adjustments made to reflect lessons learned during the process.

9. **Deliverables**

- a. Quarterly Reports, including the following information
 - i. Energy Management Plan to be included in the first quarterly report and progress against goal updated thereafter
 - ii. Description of energy tracking and monitoring system
 - iii. Agendas and write-ups from cross-functional energy teams
 - iv. Discussion of strategy for energy savings Measurement & Verification
 - v. Reports from walkthrough audits that identify opportunities for further investigation
 - vi. Discussion of procedures put in place to address operational and maintenance misuses of energy; write-up of operational and maintenance misuses employee training session
 - vii. Proposed energy (capital and operational) and productivity project list, descriptions, savings analysis, and economic analysis
- b. Project management check-ins with NYSERDA via conference call at least once per month and twice per year on-site, or at NYSERDA's discretion
- c. Final report that documents overall effort and progress against site energy goal
- d. Case study, including savings metrics, for online publishing
- e. Road map of the On-site Energy Manager on-boarding process, for online publishing.